

# SUMMIT WEST

## Independent School

### **POLICY TITLE:** **Fundraising**

**Board Approval:** December 8, 2015  
**Board Review:**

### **OBJECTIVE:**

Fundraising is just one way that parents and communities may choose to support their school. Fundraising should reflect the values and expectations of the school community, including parents, students, staff, administration and the board.

Fundraising activities will be conducted under the guidance of the school principal, in accordance with any existing school board policies and with advice and input from students, staff, parents, and the broader school community.

All fundraising must have a designated purpose and proceeds should be for that purpose, as intended.

### **POLICY:** **Guiding Principles for Fundraising Activities**

#### *Complementary to Student Directed Education*

- The purposes for which funds are collected should be consistent with the school board's mission and values.
- Activities should support student achievement and not detract from the learning environment.
- Funds raised for school purposes are used to complement, not replace, government funding for education.

#### *Voluntary*

- All students and staff are welcome to participate in fundraising activities. These activities should reflect the diversity, values and priorities of the school community and school board.

- Participation in fundraising activities is strictly voluntary for staff and students. Parental consent is required for student participation.
- Privacy should be respected. The personal information of staff, students and other individuals should not be shared for the purposes of fundraising without prior consent.

### *Safety*

- The safety of students must be a primary consideration in all fundraising activities.
- In addition to parental consent, student fundraising activities require supervision and should be age appropriate.

### *Accountable & Transparent*

- Fundraising activities should be developed and organized with advice and assistance from the school community, including students, staff, parents, parent involvement committees, school councils and community organizations.
- The policy regarding the use of fundraising proceeds and accounting for school-generated funds shall be publicly available.
- A fundraising activity must not result in any staff or volunteer benefitting materially or financially from the activity.
- Fundraising should have a designated purpose and the proceeds should be for that purpose as intended. Transparent financial reporting practices to the school community should be in place.

### *Fundraising activities must be compliant with:*

Municipal, provincial and federal legislation  
 Alberta Education guidelines and applicable policies  
 School board policies

### *Acceptable Uses of Fundraising Proceeds*

- Assistance fund (for example, a fund service charitable purpose to benefit students, such as providing payment for the cost of a field trip for students who cannot afford it)
- Purchase of additional supplies, equipment or services not funded specifically through the school board budget (ie. band equipment, specialized athletic equipment, pottery equipment)
- Field trips or other excursions
- Guest speakers or presentations
- Ceremonies, awards, plaques, trophies or prizes for students
- Establishment of scholarships or bursaries
- Extracurricular activities and events (for example, travel and entry fees for sports, competitions, team uniforms, school band, choir, clubs)
- School improvement projects (for example, playground equipment, shade structures, gardens, outdoor skating rink, greening initiatives)
- Upgrades to school facilities that do not increase the student capacity of the school (for example, rebuilding of cafeteria stage, retrofitting an auditorium)
- Upgrades to sporting facilities such as running tracks, specialized recreational facilities, installation of artificial turf or score boards

- Technology investments which complement and do not replace existing school board allocations
- Other uses, at the discretion of the Board of Directors

Board of Directors Practices for Fundraising Activities

**Annually, the Board of Directors, in support of and collaboration with the Parent Involvement Team, will:**

- Determine the extent and number of fundraising activities for the upcoming school year
- Develop and support fundraising plans
- Review the previous school year's fundraising activities, including any overages, shortages and cancellations, student participation, impact on classroom time for staff and students and administrative time for staff, and school community feedback
- Assist with planning and selecting capital projects, including a viability review that examines alignment with the school board's overall capital priorities and planning processes, the school's improvement plan, and Alberta education priorities, cost for future maintenance and repairs, and restrictions related to conflicts of interest

**On an ongoing basis, the Board of Directors, in support of and collaboration with the Parent Involvement Team, will:**

- Support fundraising activities where possible
- Communicate openly and freely with the Parent Involvement Team's liaison at each monthly board meeting
- Assist the Parent Involvement Team, staff and teachers in communicating clearly and openly how fundraising proceeds are being used
- Provide an annual report on school generated funds to the public
- Adhere to all applicable financial reporting policies outlaid by Service Alberta

**The Parent Involvement Team will:**

- Be responsible for the establishment of school bank accounts, issuance of receipts, authority to pay disbursements, recording of donations, investments, bank reconciliations, records retention, financial reporting, financial responsibility for shortages and overages generated by fundraising activity, financial review/audit and a chart of accounts
- Provide financial reports to the Board Treasurer and/or Executive Director as needed
- Provide the Board of Directors with an annual list of potential fundraising activities for review and approval
- Comply with all board policies and municipal, provincial and federal regulations
- Appoint a liaison to attend monthly Board meetings